

Courier Training Framework

Introduction

This Courier Training Framework is a tool for developing and delivering courier training. It has been put together as a basis for promoting best practice in the museum and gallery sector. This idea arose from the inaugural meeting of the European Registrar Groups in 2015 and has since been developed with input from sector specialists and professional registrar bodies across the world.¹

The training tools that accompany this framework are:

- Presentation and training script (editable PowerPoint)
- Courier Manual (editable Word)
- Template courier questionnaire (editable Word)
- Template courier scenarios (editable Word)
- Example courier scenario questions and answers (separate documents, both PDF)
- Bringing the training to life (PDF)

The framework is based on the principle that we should send couriers only when necessary, and the focus is on preparing the courier for the unexpected as well as creating a shared sense of what a professional courier role entails.

This is a free tool, and we hope it will be used widely to share training opportunities. We appreciate that trainers may need to apply a cost-recovery model, but we request that training derived from this model is run on a not-for-profit basis in keeping with the ethos in which it has been created. We welcome any feedback to inform future versions.

We hope that the framework will be a useful tool in training couriers, and that by sharing it we can foster a sense of shared understanding of how to courier better.

¹ This resource has been developed by Kathy Richmond (Head of Collections and Applied Conservation, Historic Environment Scotland and former Chair, UK Registrars Group), Desirée Blomberg (Manager, Exhibition Coordination & Loans, Moderna Museet and Board Member, Nordic Registrars Group) and Wendela Brouwer (Head Registrar's Office, Rijksmuseum and Chair, Nederlandse Registrars Group). The Courier Training Framework has been translated into several different languages and we hope it will continue to grow in reach and use. If you are interested in developing a translation, please check with the developers (contact details at the end of this document) to ensure this is not already in development.

How to use the framework?

There is a suite of documents provided and the idea is to read the framework and follow the guidance to amend the manual, the PowerPoint, and the scenario questions (for use in section 9).

This training is designed to be delivered by registrars and collections specialists whose role involves managing couriers. There is an assumption that the institution has a registrar team or role, but if that is not the case you may wish to amend those references to clarify where colleagues can seek further guidance, support and who is in charge of coordination.

The order and content are flexible, and users may wish to incorporate additional elements to tailor the training to their organisation or network. This is essentially a framework on which to build your own training. Some users may simply wish to use this as a benchmarking exercise where they already have good training in place.

Questions that you may wish to consider when adapting the training to suit your needs are:

- What organisational policies may affect, or need to be incorporated into the training?
- What responsibilities and duties will your couriers need to undertake?
- What is routine, and what is unusual for your organisation, and therefore how much detail is needed in each area?

The framework contains information and advice for the organisation/person designing the training (in *italics*), and then a suggestion for content. The framework is divided into sections to help give a structure.

We highly recommend that the training includes an opportunity to meet with conservators and art handlers/technicians and to run through the process of condition-reporting, packing/unpacking, good handling techniques, and how to hang or mount objects as appropriate to the type of collection. Local agents may also be able to offer demonstrations or more information about palletisation processes or loading into vehicles. This kind of hands-on training enables couriers to become comfortable with processes and fixtures/fittings and to ask any questions they have within the team.

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1. Setting the Scene

To introduce the training, you may wish to outline the structure of the course, the key learning aims, what the courier will have gained by the end of the session. An 'ice-breaker' can also help to set the scene for the day. For example this could be round table introductions, and/or you could choose a scenario to read out loud to get the group thinking.

1.1 Introduction and organisational approach

Thinking about the context in which your courier training is being delivered - what is its purpose? How does this fit within the aims of your organisation? What are the expectations of a fully trained courier?

This training is designed to give a guided tour of the role and reality of a courier. We will cover how to prepare, what to expect, the different types of journey, the duties and the responsibilities, plus what to do when the unexpected happens.

Optional depending on your training design: The training will be broken into information which will be delivered to you, as well as more practical hands-on learning. We will also cover some potential courier trip scenarios and will ask you to consider in groups how you might apply what you have learned to ascertain 'What should the courier do?'

1.3 Managing expectations

Here we recommend further scene setting by explaining the benefits of couriership but also outlining what couriers are most likely to encounter and how to prepare for this. If available it is helpful to include images and/or stories of recent courier experiences from within your organisation.

The joy of couriership

Couriership brings many positive opportunities. Some of the benefits of being a courier are; networking, travel, working 'hands-on' with the collection, and it provides opportunities for growth and working outside your usual remit.

The reality of couriership

Although couriership can be joyful, many trips also involve long journeys, often by motorway or with large amounts of time spent in industrial cargo sheds or loading bays. Although travel is involved you may be limited as to the time spent in the destination. Situations may occur which push you outside of your professional comfort zone, or that test your patience. You may experience jet-lag and tiredness and the journey can be strenuous so if you have a concern that you may not be able to manage this, please discuss this with your registrar.

2. What is a courier and why do we send one?

This is an opportunity to outline for the courier what their remit will be, again, building in your organisational policies/requirements as appropriate. We encourage trainers to ensure their trainees think carefully about why the courier is sent. Is it for the shipment itself? Is it because of the value/fragility of the artwork? Is it because of the complex installation or as part of due diligence because the lender is new to us? Understanding the 'why' in sending a courier is a vital part of the training. If the courier knows the general framework about 'why', they will be more able to navigate difficulties they encounter along the way and find appropriate solutions. It will also help to establish a view of courier practice that is about risk management, dispelling any myths around courier work being an entitlement or perk.

One way of kick starting this discussion is to ask trainees to do quick exercise, to write down three things a courier is, and three things a courier is not. Give them 60 seconds and then collect and discuss all the responses. Themes of good and bad practice can then be drawn out.

As the field of shipping both art and couriers has an effect on the environment, we feel the urge to highlight this topic. Trainees often ask about this, so it is good to be prepared to respond. If you haven't already, you might want to explore this topic within your own institution to look at opportunities for increasing sustainable practice.

- *Can we collaborate with other lenders who may have objects traveling to/from the same institution to/from the same airports? Can shipments be consolidated and objects co-couriered? Can a local professional (conservator, registrar etc) be contracted if the venue doesn't have the right expertise and this reduces costs for everyone? This may raise question of responsibility and liability but none of these issues are impossible to find solutions to. Exploring these questions at the outset will help the trainees understand how much thought goes into their journey, and that a requirement for a courier has a big impact.*
- *There are several ways to CO2 compensate for courier flights. You can investigate if there are methods that suits your institution and ask the borrower to accept the cost. It doesn't make flying more sustainable, but it is a way of trying to at least balance the carbon footprint for the flights.*
- *For incoming couriers, you can decide to use only Eco-friendly hotels. And for outgoing couriers you can ask the borrower to do the same.*
- *Transportation is a field where much can be done. You can investigate how your shippers work with climate issues, ask them about their sustainability policy and influence them to take the lead regarding sustainable packing material and crates.*
- *You can update your policy regarding the use of crates. Can you store crates and reuse them, instead of building new crates, or work with suppliers who rent crates as well?*
- *Borrowing/lending has traditionally been associated with loads of paper. Can we leave the mountain of paper behind and start sending/accepting loan requests digitally? Can*

we step into the future by using digital signatures only and never even send loan contracts by land mail?

Why do we send a courier?

Depending on the type of journey you are undertaking, it could be that you are required at installation only, or alternatively you could be accompanying an object 'nail-to-nail' (from point of packing until it is on the wall at the host venue).

Risk to the loan

Think about the specific risks that an object might encounter during a loan. Many of these can be mitigated by good communication between the lender and borrower in preparing for the loan. It is the responsibility of the courier to do their best to ensure that the object is safely loaned. Their responsibility can involve accompanying, supervising or directly handling the loan object, as part of the chain of custody. The courier is often therefore both guardian and decision-maker in regards to the best interests of the object (bearing in mind they may need to refer to base for some decisions). They must also be aware of the expertise and vested interest of others involved in the process (agent and borrower) and work as part of a team to find appropriate solutions to any issues that arise.

The courier is expected to be familiar with the object being lent and to undertake the condition check and installation along with the host venue team. Sometimes this means supervising installation, but in certain cases they are expected to lead install, or to handle or assemble objects where appropriate.

The courier is representing the organisation at all times, but normally at the borrowing venue's cost (which is often a significant amount therefore it is vital to both understand and fulfil the requirements of the role of courier). The purpose of the courier's role can differ in terms of the practical tasks, but they are always at the apex of the relationship between lender and borrower, often witnessing that contractual obligations (from both sides) are fulfilled.

Risk to the environment

Environmental impact is not limited just to the courier trip itself but concerns the whole arena of lending and borrowing from what we say in our loan policies, to packing and crating specifications, transport requirements, as well as hotels and more.

Finding a balance

The decision to send a courier can have a big financial impact for the host venue, but also impacts on the resources of both institutions. Deciding when, and when not, to send a courier is a fine balance.

If we, for example, are more concerned with the loading processes at the airport than the installation at the venue, may we send a courier to load the crate at the local airport and ask the borrower to send a courier to supervise the unloading at the destination?

3. Preparing the courier

Here we outline the support and preparation which will be provided, and the areas which a courier needs to take responsibility for. This helps to define the relationships and ensure that couriers understand there are elements they need to prepare as well.

What is arranged for you?

An itinerary is normally provided by your registrar (working with host venue), giving details of the planned trip, objects involved, venue, agreed conditions of loan (i.e. how and where you will install at the venue) and useful contacts. Your travel, per diem², hotel, and travel insurance are normally provided, along with guidance in obtaining a VISA where necessary. Business class travel is usually provided for any long-haul flight where you are travelling with objects (on a passenger flight), and economy at all other times. Note there is no differentiation in class on a cargo freighter, and rail travel is likely to be assessed on a case-by-case basis.

Depending on the nature of the courier trip, there may be other types of preparation needed. If you are expected to talk to the press (for example if your object is the star of the show) a media briefing may also be necessary.

What do you need to arrange?

Ensure your passport and any other travel documents are up to date, and check and confirm if you need additional inoculations, or other healthcare certificates (e.g. testing for Covid-19), for travel (these may be covered by your institution – you will need to check). Check for any healthcare measures and local rules. Do you need to take masks?

Check that you understand the route and all aspects of your transit. You may need small amount of local currency for personal use or for arrival arrangements (especially where the per diem is paid at the venue) your registrar should discuss this with you but it is always worth scoping in advance. It is strongly recommended to have a credit card that works in the destination country. Check the route from your hotel to the venue and how much time you will need to get there for your installation appointment.

Ensure you have a means of communication (e.g. a mobile phone). If working internationally, check that the roaming is enabled for the area you will be visiting.

Research the destination climate and dress appropriately. Cargo sheds and depots you may visit on the way to a hot climate can be very cold, and you are likely to need sensible clothing and practical footwear. Check whether hand luggage (carry-on) or stowed luggage (checked)

² 'Per diem' means an allowance of money for use each day. This is sometimes (but not always) provided in cash on arrival at the borrowing venue to cover the cost of the courier's meals and in some areas/venues other agreed costs such as local transport. Check in advance with your registrar what the arrangements are, and any requirements.

is permitted (a courier with hand luggage is more flexible). Ensure your luggage and its contents are compatible with all airline restrictions.

Last, but not least, it is good practice to clear your diary immediately before and after the trip where possible. This will help to minimise the impact if there are any changes in schedule.

What kind of paperwork to expect:

Here we outline the documents and agreements which couriers will be using, so when they are referred to later in the section 'The Journey...' trainees will understand their significance.

The key documents for the courier:

Condition report: This records the agreed condition of the work upon arrival at the venue and will form a point of reference for condition check upon de-installation and unpacking upon return.

The courier will normally be responsible for undertaking a detailed condition check of the loan object (together with the venue) and signing the condition report with the venue. Agreeing the condition of the object at point of delivery (and checking there has been no change since packing at the point of origin) is how the lender and borrower agree who is liable for any damage or loss. Familiarise yourself with the object you are lending (this can be done by viewing the object together with the conservator who prepared the condition report) and if you are working outside your normal remit, ensure you understand all the terminology contained in the condition report.³

Courier itinerary: This is usually provided by the registrar, giving details about the venue, route, staff you will meet (including venue staff and transport agents), accommodation, and per diem (daily subsistence money, normally provided by the venue), as well as the loan requirements you are responsible for.

Travel documents: These are usually provided by the registrar, and likely to include flight tickets, and personal travel insurance (to cover any medical issues or theft of your personal belongings). Note that if there is a theft of your personal belongings, you are likely to need to inform the local police and obtain a crime number to validate your insurance. Always seek advice from your travel insurance provider at the time this occurs. You may need to arrange private travel insurance if you are extending your trip.

Other paperwork you might encounter:

Receipt: This records formal hand-over of object responsibility to the venue. This is normally signed at point of departure from the lender, when handing over to the transport agent (the beginning of the chain of custody), on behalf of the borrowing venue.

³ How to read the condition report is covered in more detail in Section 5.

Loan agreement: You may be provided with a copy of the loan agreement terms where appropriate.

Insurance: You may be provided with a copy of the insurance which covers the loan of the object where appropriate.

Packing report/instructions: Where necessary, you be provided with or need to generate packing instructions to help clarify how the item is packed (for example if it is a sculpture in a crate with foam inserts, instructions and/or pictures will help ensure the packing is easy to replicate and the order is clear).

Customs paperwork: This will normally be handled directly by your transport agent and customs staff.

If the venue presents you with additional paperwork you were not expecting, check with your registrar before signing. Do not sign anything with terms and conditions without checking, and do not sign anything which is presented to you without a translation (anything which you do not understand).

Local customs (ways)

This section raises awareness of the differences in local customs and business etiquette, to avoid any personal or institutional embarrassment. Consider whether the giving or receiving of institutional gifts might be normal at the host venue and check your institutional policy on this and whether you might need to prepare or support the courier.

The region you are visiting may be a different culture to your 'home' culture. Although it is not always necessary to adopt the etiquette of the host country, a level of awareness will help couriers to communicate effectively with host teams.

Consider whether the region you are visiting has any customs (ways) or business etiquette that you need to be aware of. Seeking advice from other colleagues who have visited the region can be helpful, but there is also a wealth of information online which can prepare you for what to expect. These can be simple things such as taking business cards when visiting Japan, to more complex issues such as appropriate dress in different cultures. Keep in mind that working patterns/hours can differ depending on things like climate and local culture.

4. Preparing the loan

*Making the courier aware of all parts of the process leading up to the loan will help them to understand their role in context. It is important that they know which parts of the process they will be involved in, and which parts other colleagues will be preparing. This provides reassurance that the registrar and host venue are working together to ensure the risks are mitigated and there are no surprises for the courier. This section is **organisation-specific** and therefore consists of a series of questions to be answered:*

- *How the loan is agreed internally, and how far in advance?*
- *When and how is the courier identified/selected?*
- *Who liaises with the borrowing venue, and what preparations are made in advance (facilities reports, environmental data, display details, access, sharing cases, insurance, selection of transport agent etc.)?*
- *What processes do the loan objects go through (photography, condition report, conservation treatment, cleaning, framing or glazing)?*
- *What kinds of packing can the courier expect (explain the different types of packing your institution uses and what for)? For example, are cases ordered, or may certain works travel soft-wrapped?*
- *Where will the object normally be collected from? Will it be transferred from another place first (internal or inter-site moves).
At what point will the courier have the opportunity to familiarise themselves with the object? Will they be able to discuss the condition report with the conservator or registrar, and the mount or hanging system with the technician?*

If you are delivering training within your organisation, it is recommended that you give the trainees more specific information about how your organisation manages and approves loans and selects couriers.

5. How to read the condition report

Ensuring that the courier understands the condition report process is vital. It is recommended that where possible, an element of the courier training is delivered by the conservator, and the opportunity to try condition checking under supervision. Although many institutions select conservators to courier objects with known conservation issues (where they have conservators on staff), it is possible that an object thought to be stable could suffer a change in condition during the loan, which has not been previously identified. Giving non-conservator courier's information about signs to look out for, or the typical issues that can arise, will help them to identify any potential signs of damage at an early stage.

One of the main tasks of the courier is the condition check of the object. The 'tool' for undertaking the condition check is the condition report. There are many forms and varieties in different museums, countries and for different types of object. The most important advice is to check the object first and take a look at the condition report next. In this section you may wish to include information about how your institution prepares the condition report (whether this is generated by the registrar, conservator or external conservator, and when and how the information in the report is generated).

The condition check is a process in which both lender and borrower should be involved. As a result of this check, the current condition of the object is formally agreed and captured by both parties (lender and borrower). Although both parties have a vested interest in this process, it is particularly in the interest of the borrower to record the condition accurately and to flag through this process any undocumented condition issues. This helps to ensure that any pre-existing issues (or those which may have been caused in transit) are noted, agreed and explored as necessary. At deinstallation and/or unpacking upon return, the signing of the report captures any change in condition whilst the object was in the care of the borrower, so at this stage it is particularly in the interest of the lender to ensure the condition is checked and recorded.

Condition checking – important steps:

- Ensure that you go through the condition report before the object is packed, so you are familiar with any recorded/existing damage or repairs at the outset. It is recommended that you do this together with the person who wrote the report.
- Upon unpacking, it is a good idea to check any packing, such as the bottom of the transit frame, for small losses (such as flakes of gilding from a frame).
- When condition checking with the borrower, ensure you check the object first, and the condition report next.
- It is important to note all visible damage, including old restorations/repairs.
- Make sure that there is sufficient lighting. You may wish to use raking light to check the surface.
- Note any changes in condition, take photos and ensure that the borrower is aware. Add a date reference if needed.
- Call your registrar if you note a change in condition.
- Last but not least, make sure the condition report is signed by both parties. Take a copy/scan or the original as directed by your registrar (note that one copy usually stays with the object so this can be referred to during the loan period as needed).

6. The journey...

There are many different types of courier trip, from a simple visit to a neighbouring institution to assist with installation of one work, to accompanying a tour of mixed-media works to a multi-venue exhibition tour via air and road and where the host countries do not share a common language with the lending venue's courier. Before you begin with your training, it is important to consider which elements of training need to be covered in-depth, and which may be outlined for further training as and when they are encountered. It is also essential that you are aware of your institution's policy on couriership. This training has been designed on the basis of pragmatic assessment, and a presumption to waive couriers unless there is a clear need. It is worth outlining to trainees that not all courier policies are the same, so they may encounter other couriers installing at the host venue whose requirements are more (or less) stringent. It is also good to explain that insurance requirements do occasionally dictate whether a courier is needed. Think also about whether you permit stacking of crates or have a preference in terms of flight direction so you can advise your couriers.

As a courier you may be involved in the collection of works, including supervising loading (and checking a truck). You would usually be working with a fine art transport agent using a museum specification vehicle. This should include a suitable tail-lift, lockable rear portion, it should be clean, clear and free of loose cargo (everything should be securely tied off using two straps in-case one fails in transit). The sides of the vehicle should allow suitable points for tying off cases/objects, and suitable ties or ratchet straps should be available. For most objects the vehicle should be air-ride, and have a temperature control system (with a display/control panel that can be read and adjusted in the main driver cab). Check in advance what temperature range is suitable for the object you are accompanying (when packed), and ask the drivers to confirm that the hold is within that range before loading.⁴ If the temperature is not compatible, check that the system is switched on and the rear doors are closed and ask the drivers to wait a short while until the temperature is within an appropriate range.

The majority of courier journeys include a journey by road. During any planned stops for fuel or comfort breaks you should follow a protocol of taking it in turns with the drivers to ensure the vehicle is never left unattended. Journeys can be lengthy so ensure you are prepared for this. Never lock your personal cabin bag in the hold with the cargo during transit (unless you have first removed everything you might need into the cab) as this will prevent you accessing it during the journey due to the security risk.

As a courier you may experience journeys by air, accompanying objects as cargo via passenger flight.

⁴ It is common for the temperature range of the truck to be set at between 18 – 21 degrees centigrade (64 – 70 degrees Fahrenheit). In extreme temperatures it can be difficult to achieve the temperature required with the rear doors open for loading, so work together with the drivers and consult with conservation colleagues as necessary to understand the best strategy for loading.

In such cases there may be additional security protocols for air cargo in some countries and couriers may need additional training, awareness or certification in order to fulfil this role.

For journeys via passenger aircraft, the crated objects will be stored under-deck and therefore need to be palletised (the process of securing them in/on an airline pallet). This is done at the airline's cargo shed and must be completed before lock-out time (approximately 4-6 hours ahead of travel depending on the airline and destination). Ensure you are aware of the appropriate pallet style for your case size and cargo and whether a specific style has been agreed in advance. Some pallets are flat (like a baking tray), whilst some are enclosed or with soft-sides (container).

Upon arrival at the airport, you may need to wait before accessing the cargo shed. You should at this stage be accompanied by an agent/supervisor from your fine art transport agent. There can be one or more people in this role so ensure you understand what task everyone is responsible for. When you enter the cargo shed, be aware of potential hazards including forklift trucks which can travel at speed, and follow instructions from the cargo shed staff and agent/supervisor.

It is important to realise that you are a guest in this environment, and to be aware that giving direct instructions to the cargo shed staff could be perceived as criticism of their work. Communication often works out better if you discuss adjustments with your agent/supervisor – they are likely to be familiar with the cargo shed team and know how to liaise with them to achieve a good result. The courier takes a supervisory role, and the physical palletisation is carried out by the cargo shed staff.

Proximity to pallet will depend on the airline. Sometimes it is possible for direct supervision and some airlines facilitate supervision via direct video-link. Whatever the level of access, you will be working with agent and cargo shed staff to achieve the process of palletisation.

The sequence of the process for a flat pallet is as follows: polyethylene should be laid directly on the pallet first, followed by the object cargo (your crate), additional cargo may be added to the pallet and can be beneficial as this provides a barrier layer, check that any other cargo is inert (no HAZMAT⁵, liquids or perishables), a box or pyramid formation provides good protection with your crate in the centre ideally, complete the poly (but do not apply multiple layers – 'over-poly' as this can cause condensation), add ratchet straps and ensure they are sufficiently tight as to prevent movement but ensure no bowing of the pallet – also check there is no movement in any directions), next the cargo netting should be draped across the entire pallet, this is then secured and the net tightened with additional straps where required. During the process, check straps to test the tension and monitor to ensure that the poly layer is not compromised by holes during the process. Once complete, note the pallet number (this should be embossed into the corner outer edge of the pallet). Confirm if you can see pallet loaded on the system and supervise if so, then depart.

⁵ 'HAZMAT' is an industry term for hazardous materials, for example flammable liquids etc.

Palletising using a container can be more complex. Ensure you discuss with the agent how your crate will be secured within the container, and check that any other material going into the container is also secured to prevent loose cargo rattling against the crate during transit.

Check phone numbers with agent (**call to confirm they connect**), and agree when and where will they confirm to you that the pallet has been loaded.

At this point the pallet will be making its way through the system, and your level of access means you can no longer accompany it. Supervision is given over to the fine art transport agent who normally has tarmac access and will be able to witness the loading of the pallet onto the cargo deck. The agent normally remains until the cargo deck door has shut in case there is any last minute shuffling of cargo, and will then confirm that you are able to board the plane.

Whilst this is happening, you will be taken to passenger check-in. Following check-in and security checks, you may have access to a lounge depending on your class of travel. Await and monitor your flight's boarding process, and ensure you go to the gate when directed. Here you are likely to be waiting for some time as you will need confirmation from the agent that your pallet is loaded before you can board.

Once your agent has given you confirmation of loading of the pallet you may then board.

Optional inclusion: *For cargo freight couriership it may not be necessary for your organisation to cover this due to the infrequency based on your collection and patterns of lending.*

If you are accompanying an object by air that is large, normally those crated above 1.6m (63 inches) in height, then you may experience couriership via cargo freighter. Often referred to as 'Upper Deck' the cargo plane involves slightly different processes.

Similar processes are encountered for palletisation, however it is not always true that couriers then depart to the passenger terminal. Sometimes, boarding takes place directly after palletisation through the cargo terminal and via stairs to the plane which consists of a large deck or belly through which you walk directly to reach a near vertical ladder into the crew area and flight deck. Couriers travelling cargo may not receive a normal boarding pass, and may be required to complete additional paperwork. Check in advance with your registrar/agent what to expect. It is often possible to watch your pallet being loaded 'live', as access to the deck is not restricted. Always ask what is possible and follow the instructions of the flight crew and cargo staff. The crew is likely to consist of only pilots and no air hostess. Ask which food you may eat as crew food is often reserved and limit interaction with pilots as appropriate (some areas of the flight deck are restricted and only enter the cockpit if invited to do so). When accompanying objects via cargo freighter you may experience delays or occasionally re-routing. Unlike passenger aircraft cargo freighters usually follow a multi-destination route on a large circuit. You may encounter several interim stops, where cargo is exchanged, and multiple take-offs and landings. Some pilots may also interchange at these stops. Once you reach your intended destination, you will be invited to disembark and travel with any pilots leaving the plane to the terminal, normally by small car or bus.

Arrival into the terminal:

This is normally the same process for both types of aircraft which involves a customs declaration process, and a passport checking process. You may be met by an agent at the plane door, or sometimes in 'arrivals'.

When proceeding through customs it is important not to declare the cargo as personal goods (although you are a courier, it is the transport agent who is handling the customs process for the cargo). This will confuse the customs staff and lead to further questioning.

Once you have reached arrivals and met with the agent you will be taken to the cargo shed to supervise de-palletisation. Ask about the process and what can be expected. Occasionally someone from the host venue may also be present.

De-palletisation. This is normally a quicker, smoother version of palletisation, however if there is no common/shared language the process can be hard for the courier, especially after a long flight. At this stage you should check over the pallet to ensure there are no visible signs of damage, and also ensure that the vehicle for collection is ready.

The de-palletised crates should be loaded onto the vehicle (remember to check the vehicle is museum specification). Local vehicle styles can vary, so it may be unfamiliar but you need to check whether it is what is expected, and that the temperature control is on and the doors are kept closed as much as possible to maintain the optimum conditions, with other cargo secured. Secure the cargo using two straps and depart.

By ferry:

Some courier trips may involve a road transit that utilises a ferry-route. If you are travelling on board the vehicle, this is the one occasion where it is normally not possible for either the drivers or the courier to stay with the vehicle as passengers are usually asked to leave the car-deck during transit. The vehicle should be secured and your registrar will have worked with the shipping agent to agree whether the vehicle can and should be 'plugged-in' to ensure its environmental system can function. On longer journeys, you are likely to have been booked into an on board cabin so this is a good opportunity to get some rest before your journey recommences.

By sea:

Sea freight is unusual and due to the restrictions and length of transit, in most cases a courier is not practical or cannot gain access. Sometime port supervision is possible, and it may be possible to arrange for a third party agent to undertake supervision on your behalf. However in cities such as Venice it is possible you may encounter transit via boat as a means of getting the objects to the venue. In such cases your registrar will normally advise you of the procedures on a case-by-case basis.

7. At the venue

This section outlines the aspects of a courier trip a courier is likely to experience when working at a borrowing venue. Working within a team at a venue you are unfamiliar with can be a challenging role, especially when things don't go according to plan. The courier must ensure that the requirements of its own organisation are met, but should also work with the borrowing team to achieve a good and safe install / de-install.

Upon arrival at the venue unloading should be supervised, along with delivery of the object into the storage or exhibition space. Your registrar will have conducted checks into the standards of security, facilities and environment at the venue. If there is anything specific that they need you to verify upon arrival, they will let you know. If you are not proceeding to install straight away, then the crates should be left in a secure area, and not moved or opened until you are present to supervise this, unless otherwise agreed.

Depending on the length of your journey, you may be moving straight to installation or in the case of international transit you may at this point be retiring to a hotel for a well-earned rest.

If your installation is due to take place later, ensure you are on time for your installation appointment, (this includes not being too early as well as ensuring you are not late). Make sure you have everything you need and you know which entrance to take and who your contact is. Remember that installation often has a very complex schedule with multiple couriers or things that have to happen in sequence. Ensure you respect the given appointment time.

When you are taken into the display area, introduce yourself to everyone you will be working with and ensure you know what roles the people you are meeting will undertake. . Being clear about your profession and understanding the expertise of the people you are working with will help. It is easier to work well together if you know whether the staff who are present are art handlers, conservators, curators or registrars.

Normally for unpacking and installation your cases will have remained closed. Before opening, first check where the display area is and if your case can be brought as close as possible to minimise uncrated handling.

Check that the unpacking area is ready (tables set up –lighting in place etc.), and that the display area is ready (walls painted and off-gassed, plinth in position, case open, etc.). Once you are sure there is enough space, the area is ready and all the necessary people are present, you can begin unpacking, taking care to retain packing materials and to document packing particularly if complex and/or if the venue may be taking over courier duties in the de-installation phase.

Complete the condition check, together with the appropriate person from the borrowing venue. Agree and note any changes in condition, and call base if needed. It is very important that the borrowing venue engages with this process, and that they are content with the report and that it gives an accurate reflection of the condition of the object. Annotations are sometimes necessary to note 'old or existing' marks to help avoid doubt when it comes to

checking again at the end of the loan. Ensure that any annotations are dated and initialled to clarify the change in condition over time.

Now you are ready for final installation. Before beginning handling the work, you will need to ensure the team understand any fittings or hanging/mounting system being used and that they have any equipment ready.

In terms of equipment, it is important to think about (and agree in advance) whether you should use hand tools or power tools. Consider the risks which might include damage to works by slipping or vibration. If you need to use hand tools, pre-drilling pilot holes with power tools in advance without the work in the vicinity can help, with the final hang being undertaken using hand tools for better control. If your work is vulnerable to vibrations (such as a pastel) then consider whether other works in the immediate vicinity need to be hung first (hopefully the registrar and venue will have planned for this in advance). If you are not sure, seek advice from a technical expert or conservator, and discuss with the venue to ensure everyone agrees.

Gloves should be worn as appropriate to your object. Normally nitrile gloves are the least problematic. Cotton gloves can snag wooden objects and be very wary of dimple fingered gloves which can leave marks on surfaces. In case of works on paper, the gloves can act as a barrier and increase risk of damage so ensure you liaise with a conservator to understand what is appropriate in advance.

Once the object is in place, if cased then ensure all labelling etc. is finalised and witness case closing, or if part of a wall display then add any final security measures to the hung works (barriers if needed). Protective covers may be a good idea for light sensitive works if the exhibition lighting is not fully adjusted.

Ensure all paperwork is complete – condition report, etc., and you have copies where needed.

Ensure the cases and/or packing are kept together and that the venue has marked them up as necessary and have somewhere appropriate to store them. Packing materials should be saved to the extent that is possible. Ensure you document the packing if it is complex and/or take record images.

Remember to ask for your per diem if this has not already been received.

If installation is over a longer period, ensure you understand the protocol for taking breaks with regards to supervision and security, and that the team know whether they need to wait for your return before they may continue handling the object or working in the space.

In some cases your registrar may advise you of additional requirements such as checking lux levels, or seeing a barrier in place prior to departing. You may be required to take an installation image. If your loan is sharing a display case with other works, you may need to be present until the case is fully installed. If you have been asked to see the case closed and it has been agreed that the venue will not open it again until you are present for de-installation, check with them before closing the case that the labels are installed and the lighting is adjusted (as necessary). If you have a concern about something you have not been asked to

check, it is often best to call your registrar before making a request of the venue, just to ensure that it is appropriate.

Once you are ready to depart, ensure the venue are aware and they have everything they need from you.

If at any point things are not progressing as you have expected, ensure you communicate with the team about this. If you have a concern, asking the team in advance how they plan to install your work or how they plan to lift or move it can be a more helpful (and safe) approach to take than intervening during the process.

The responsibility of the courier can be overwhelming, particularly for those just starting out. Remember that the courier does not need to protect the object with their life! It is the responsibility of the courier to do their best to ensure that the object is safely loaned, so if there is something that makes you feel uncomfortable about a process you should ask or seek advice.

8. Working with incoming couriers

This section (new at version 2.0), was designed to ensure that the trainees understand the process of couriering from the perspective of the receiving venue more clearly. The key principles are to ensure that couriers empathise with the hosting venue in order to foster good levels of collaboration. It is also helpful for staff in exhibition focussed roles within your organisation (if available) to demonstrate how you do things and what their expectations and standards are.

When thinking about couriering, it is also important to ensure that any couriers we receive as a hosting venue are treated well, and leave with the impression that the museum is professional, collegiate and capable.

It is essential to ensure that there is a clear and common understanding of what the courier's expectations and requirements are, and how you will meet these. The registrar team will be working with the lending institution to establish and communicate their requirements and make preparations in advance, however it is helpful for the whole team to have a shared understanding of how to prepare for a lending organisation's courier:

- Communicate with the registrar in advance to find out who is coming, and what their remit will be. Do they have a particular reason for being the courier (is the work fragile, or does it require specialist knowledge to install), and do they bring a particular skill set (conservator, art handler, curator)?
- Will they want to see the case closed, or if a wall-hung work, are there works hanging adjacent to their loan items that need to be installed in advance?
- Do you have a clear understanding of the lender's requirements for physical installation? Will they bring fittings and mounts, or is your team providing these? Will they want to be the only person to handle the loan, or will they take a more supervisory role and require your team to unpack and install?
- Does the work require any security measures such as an alarm or physical barrier, that need to be in place before the courier can leave?
- Do you know who will provide the paperwork to receipt physical entry of the object, and document its condition? Has the lender provided a detailed written condition statement, and does this account for any additional components such as frames? If not, are you ready to compile your own condition report or do you have equipment to take supplementary images?
- Who needs to be in the space at the same time (are there multiple loans within a case meaning several couriers need to be co-ordinated, does a lighting technician need to be on hand, are there enough technicians to unpack and install the work), and who doesn't need to be in the space (any other activities should be timed to avoid clashing with lender installation, if possible)?

- Ensure that the installation wall or case is ready, and that suitable equipment is nearby to aid smooth unpacking, condition checking and installation (such as a clean table, plastazote sheeting, movable lighting, gloves etc.).
- When the courier arrives, introduce yourself to them (including what your role is) so they feel welcome and understands your discipline / skills.
- Await the lending institution's courier before moving or opening crates, unless they have given their express permission in advance for you to do so.
- Check before signing any lender paperwork such as receipts or condition reports, to ensure that these do not include any terms and conditions. If they simply document the activity, this is fine. If in doubt, refer to the registrar for guidance.
- Be clear on when breaks will take place, and communicate to everyone involved. Everyone needs to take a comfort break occasionally, and of course eat. Co-ordinate breaks to ensure that the courier is able to achieve install or take a rest when needed.
- Listen to any concerns raised by the courier, and work together to resolve these, making sure the registrar is aware if there are difficulties.

Remember that other institutions may have very different methods of doing something. This is one of the great benefits of working with lending couriers, but can also require adaptability to ensure that both parties can agree how to achieve installation.

9. Being a virtual courier

This section (new at version 3.0), was introduced as virtual technologies began to be widely used to achieve courier supervision in response to the Covid-19 Pandemic. New courier tools and possibilities, as well as the new world scene, means registrars can more easily access alternative virtual methods to manage risk. Some of these technologies have been used for a long-time especially in cargo palletisation warehouses where courier access is not permitted. However it is generally from 2020 that we have seen a significant increase in the use of communication technologies to replace aspects of physical couriership. This reinforces the need to train couriers in the use of virtual technologies, approaches and behaviours. Some trainees may struggle with concept of couriership if they have never experienced a live/real courier trip, so we have set this as a new chapter within the context of what a physical courier trip required. As the world adapts we may find in the future that a virtual first approach is the norm, and a further revision may include revision to reflect this.

It is good to be mindful that it is not good practice to request a virtual courier because you can, but instead you should identify a clear risk you are seeking to mitigate. The hosting of virtual couriers can place a significant burden on the borrowing venue.

The key principles for the trainer are to ensure that the trainee understands how to work effectively with the devices and technologies, and how to approach a virtual appointment to foster a collaborative working environment. If you are developing organisation specific training, you may wish to alter the training here to refer to specific technologies endorsed and used by your institution, and to explain how and why they were selected and offer a demonstration.

Sometimes there is a need for an element of 'live' supervision which does not require your physical presence and can be achieved via communication tools. This is a 'virtual courier'. Being able to use a virtual courier can work to manage some types of risk, whilst reducing the impact on budgets and the environment. It is important to understand that this is not without impact and requires training and preparation for both the courier and the host venue.

What is a virtual courier?

There are several different types of task that a virtual courier might be asked to participate in:

- Unloading / loading
- Unpacking / packing
- Condition checking
- Install / de-install
- Other (additional handling)

Ensure you understand which elements the virtual courier role needs to supervise and why (what are the risks you are seeking to mitigate).

Virtual couriership is usually achieved by live (real-time) supervision by video and audio link.

Similarities and differences between ‘physical’ and ‘virtual’ courier roles

Differences:

- Understanding the limitations of the technology. You may need to spend more time on the set up, and pausing of the virtual courier to ask the borrower to make clear the process as it is not as easy to ‘intervene’ successfully.
- Less easy to pick up on surrounding activities, the atmosphere in the team etc – so ensuring good risk-management based approach is key.

Similarities:

- As always, good preparation and communication are key.
- You still need to ensure everyone has a good understanding of your role in the process, and agree how the borrower will carry out the tasks you are supervising.
- You are still representing your organisation, so it is important to work collaboratively and professionally (be on time, ensure you have the right tools etc).

What are the technologies?

There are different devices and systems that might be used to achieve the virtual courier appointment.

Devices can range from mobile phones or portable electronic tablets, to laptops and cameras. Portable devices can help you to be mobile and get closer to the action, but this can also be a challenge (users may experience motion sickness as a result). Fixed devices can be set up to show a specific angle or view. This might be a challenge in terms of being able to see close details, or if action strays out of the field of vision.

Software systems range from encrypted Apps to organisation approved communication products like Skype, Microsoft Teams, Zoom, etc. It is important to understand whether the system being used is accessible to the virtual courier, and that they understand how to use it. If it is your first time using a particular system, requesting a demonstration test before the appointment will help ensure you are prepared. You could request to use your own organisation’s systems to achieve the appointment, but in which case you should offer test to the organising venue.

Virtual couriership is heavily reliant on wifi coverage both for borrower and lender. The organising registrar should have checked this in advance, but it is good to test systems before the appointment to identify if the connectivity will be an issue and find a solution.

Image quality can be a limiting factor, and a courier is unlikely to be able to pick up subtle changes in condition, for example lifting paint, cracks, or fine changes in surface condition which might be a cause for concern. It becomes even more important for the courier to know the object well, and to know what potential issues need to be highlighted in the appointment and whether the systems and devices are appropriate to achieve this.

Some appointments may require a hybrid solution with real-time supervision and then high-resolution images to be sent over by e-mail.

What to expect?

It can be a very different experience from a process where the courier is physically present. The courier may not have the same chance to establish a rapport with the person/people at the other end of the camera as they would in person. Factoring in time to ensure communications are working and everyone is comfortable will help.

As with a physical courier trip, there are preparations that will have taken place in advance:

The lending registrar should be working with the venue to agree:

- Type of tech and platform (high quality video and audio link)
- Who will manage – usually a dedicated operator.
- How to overcome any language issues – it can be more difficult to communicate virtually if there is not a common language.
- What you (the courier) need to see, and who will work with you to facilitate this.
- How the condition report will be signed if you are undertaking the remote condition check together.

What should you do?

- Be on time. (Be mindful of time zones and ensure you have factored in daylight savings time especially in countries where this can be variable).
- Ensure you have good connectivity (as far as possible).
- Minimise background noise for effective communication.
- Take time to introduce yourself and establish a good rapport.
- Think about camera angles – can you see everything you need?
- Ensure you have a copy of the condition report at hand (and have reviewed it in advance) – and the borrower also has the same document. Usually digitally but can be a scan of a hard copy.
- Begin the courier session by a brief survey of the immediate space and an introduction of the lender's team.

- Recap on expectations and roles if needed.
- Review order of operations
- If something is not working (sound is too poor or people keep blocking camera etc), ask for things to be adapted.
- Be mindful of how you use the sidebar/chat function – this could help, but take care it doesn't distract focus.
- If issues arise that cannot be resolved in the appointment, discuss options and communicate clearly with the borrower – should they carry on without you or should they stop and rearrange the appointment once the issue is resolved?
- Have a plan ready for what happens if the internet connection or signal fails? For consistency – your registrar might publish this in your loan agreement, or as a separate instruction.
- Be patient and understand that, just like an in-person courier experience, the unexpected could happen and you will need to be flexible in your time commitments

Agreeing what is needed for a virtual courier trip is a good test to focus all parties on risk mitigation. It is good to check whether you need to see all process 'live', or whether it would be satisfactory for the borrower to record the process and send you the video or images later for confirmation.

Just like a physical courier trip it is important to understand the impact of any additional requests you make. For example asking for lots of images to be provided, or creating and sending videos, can be a significant burden to the borrower. Only ask for what is necessary and consider whether this is proportionate to the risk being managed.

Hosting a virtual courier

If you are hosting a virtual courier, we recommend you communicate early to ensure expectations of the appointment are aligned, and technologies are tested to avoid problems on the day. Having an alternative plan in case connectivity fails is also important.

Can you offer the lender a range of options that cover the risk they are seeking to mitigate and ensure good communications?

What should you do?

- Confirm the virtual courier appointment time and all attendees in advance.
- Confirm the platform is functional for both host and virtual courier.
- Aim to provide two camera views if possible, one showing the workspace overall and one to focus on the object
- Reduce ambient noise in the gallery
- Confirm audio and video are functional prior to appointment time.
- Once the virtual courier is present, make introductions and communicate expectations and order of operations prior to beginning work.

10. Dealing with the unexpected (scenario based learning)

A lot of the courier training information will be about situations the trainees have not encountered, and it is possible that they may not be in a position to undertake their first/next courier trip straight away. Scenario based learning will help with this as it gives learners an opportunity to consider how they would respond in given situations, testing their new-found skills but within a safe space.

If possible, it is recommended that you arrange an interactive element of the training, where trainees are given scenarios and asked how they might respond (ideally in groups to encourage discussion as part of problem-solving).

If you have relevant scenarios from your own organisation you can use, this may make the training more 'real'. However you do need to take care with real cases that they do not show examples of poor practice or give names of staff or institutions involved where this could have a negative impact on those involved or give a poor impression to the learners.

It may help to use examples that give a range of scenarios from quite simple routine incidents to more unusual 'one-off' circumstances. Also, consider providing a variety of problems for the trainees to solve, and that these cover key learning elements of the training (environmental issues, transport logistics, access problems, installation scheduling issues etc.). It is important to consider in advance how the scenarios will be answered – do you plan to have 'right answers' or is a more flexible approach needed? If you have constructed scenarios based on real experiences, then it is possible to ask – 'what would you do in this situation as a courier?', then respond with what did actually happen. Otherwise you can draw out the possible responses and tease out the potential consequences of various actions with the group/trainee.

The scenarios provided here may be used if it is not possible to create bespoke examples. These are fictional examples, based on general experiences of what types of situation can occur. It is useful to include a range of scenarios that challenge but also build confidence in approaching and breaking down situations. Think about using examples that demonstrate the limitations of the courier's authority and help to draw out what they have learned in the training.

11. How to move from courier training to trained courier?

After receiving courier training, there may be a delay between the training and the opportunity to undertake a courier trip. We recommend advising trainees what the 'next steps' will be once their training is complete, and that they receive training materials to take away and review nearer to their first trip to help refresh their skills.

There are different levels of complexity of courier trip, so it is normal for an organisation to seek opportunities for a courier to develop from a more simple 'installation only' type task to a road journey, then airport palletisation and later by cargo freighter. Development can also be graded in terms of length of trip, and from local, to national and then international couriership. This helps the courier to adjust to the responsibilities in a manageable way.

Some institutions arrange for co-couriership or shadowing (going on a courier trip with a more experienced colleague). This can be costly, and should not impact on the borrowing institution. It is collegiate to check with the host venue if they are happy to accept a second/shadow courier, even if it is your institution bearing the cost.

Another way to help a courier train is to arrange for them to participate in an incoming exhibition and shadow or host visiting couriers and incoming loans. This is a good way to demonstrate the processes involved without cost to the institution.

To help new and developing couriers, you may choose to issue a courier questionnaire which guides the courier through the anticipated stages of the loan. This is a good tool to help record the courier's experience of the trip, and to keep them on track with any requirements, and can be used as a basis for de-brief upon return. An example courier questionnaire is provided as part of this Courier Training Framework.

12. Courier Dos and Don'ts

Do know your object, including how it is packed, and how it can be handled and displayed.

Don't make plans that conflict with your courier duties, and be cautious about making inflexible plans immediately afterwards (delays can be experienced).

Do communicate clearly, ask questions when you are unsure, and include others in your decision-making process.

Don't forget to call base if there is a problem.

Do be organised and on time, ensuring you are fully briefed or have read the courier pack so you know what to expect.

Don't be late (or very early) for your installation appointment.

Do look after yourself, ask for breaks when needed, and take rest when appropriate.

Don't struggle on if you are ill, call home and let your registrar know so alternative arrangements can be made.

Do undertake your own research to help make your trip go smoothly.

Don't miss your flight due to poor time-keeping or planning.

Do be proactive and try to think one step ahead.

Don't let anyone distract you from your role.

Do be prepared for anything, be flexible, pragmatic, and solution-focussed.

Don't protect the object with your life!

13. Defining a courier: Courier Essentials

We suggest you conclude the session by asking the trainees to put together their own definition of what makes a good courier. A template is provided for you to draw up a Courier Essentials list. This can be an exercise within the training session only, or something you may wish to adopt more formally within your organisation or network.

14. How to choose the best courier for the job?

It is best practice to assess first the needs of the object, and then the logistics of the loan in order to establish who is most suited to undertake the trip. This can be complicated by competing demands such as the need to develop staff, or making the most of resources (for example a colleague may wish to visit a borrowing venue to undertake research). Working out how to balance these needs or prioritise can be problematic. Below is a series of questions designed to help assess the needs of the object/loan.

- *Is the object fragile, or susceptible to change in condition?*
- *Are there likely to be small losses incurred during transit (for example flakes of gilding detaching from a frame surface), which would be better dealt with at the receiving venue by someone who knows the object?*
- *Does the object have any pre-existing issues which require monitoring?*
- *Does the object need specialist installation, unpacking or assembly? Is the object heavy, difficult to move or hang, or requires specialist technical fittings?*
- *Is specialist equipment needed either to bring the object into the exhibition space, or to install it?*
- *Is the venue new (either new to you as a lender, or brand new as a building)?*
- *What staff (conservators, art handlers etc.) are available at the borrowing venue?*
- *Is the journey complex? Will it involve palletisation, loading/unloading, customs processes or overnight warehousing that the courier needs to supervise?*
- *Are there language differences, and would a native speaker to the host country be advantageous?*

Sometimes more than one skill set is required, in which case it is best to choose a courier who can fulfil the most vital requirement and provide training for them to manage the other elements if at all possible, rather than send multiple couriers at the expense of the borrowing institution.

Courier-sharing is an important 'tool' when your aim is more efficiency and better use of resources without losing quality standards or introducing risk. Consider as well whether your institution can agree to courier-sharing and how this might work. Some institutions use a 'waiver of liability' and others adopt an informal approach, but it is vital that the role and responsibilities are agreed between both parties and communicated to the courier responsible. Consider who the courier contacts in case of an incident, what their remit is and whether they have enough information about/knowledge of the works to carry this out.

Conclusion

We hope that you find the framework a useful and professional tool.

Please share with us any examples of the Courier Essentials that your trainees put together as a result of this training, along with any photos of training you are able to share.

We would also encourage you to share any feedback you have so we may build this in to future versions, please send this to us at:

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Endorsements

Endorsing body	Logo	Link to website
UK Registrars Group		www.ukregistrarsgroup.org
Nordic Registrars Group		www.facebook.com/ERC2014/
Nederlandse Registrars Groep		www.nederlandseregistrarsgroep.nl/
ARCS		www.arcsinfo.org
Swiss Registrars		www.swissregistrars.ch

Translated versions are available as follows:

Language	Lead translation group logo	Link to website
German / Deutsche		www.registrars-deutschland.de/
Italian / Italiano		www.registrarte.org
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